



# Kees Kruythoff Priya Nair

## Home Care Division



# Our Home Care Business

## Strong Brands



**20%**  
of Unilever

80% EM Footprint

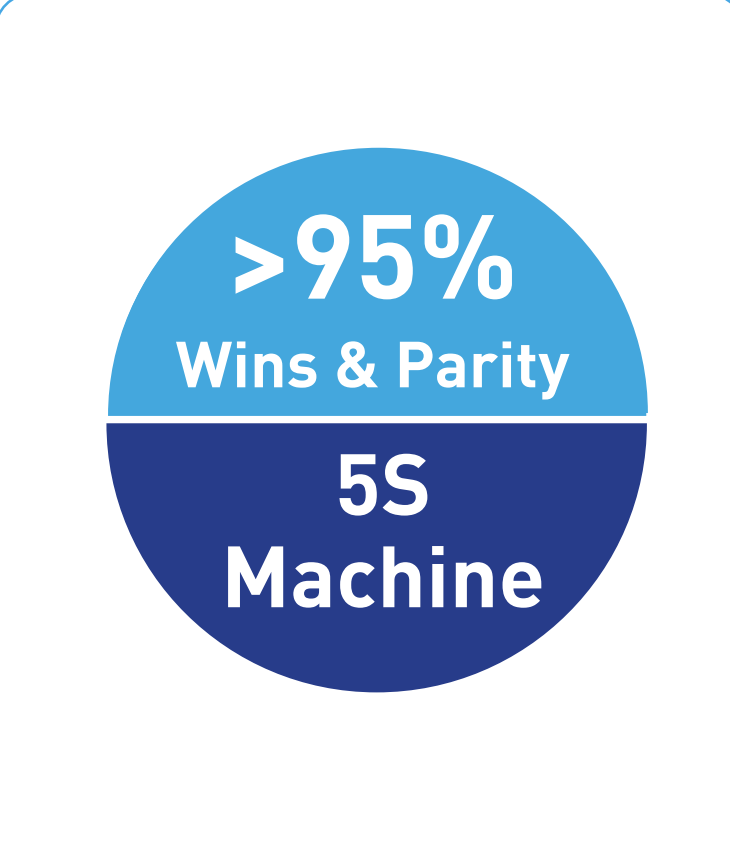
## Engine of Growth



**+4.5%**  
CAGR  
2014 – 2017

Leaders Where We Play

## Superior Products



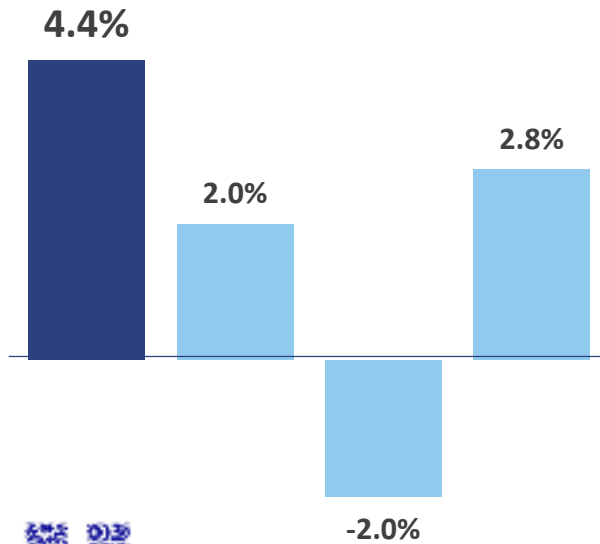
**>95%**  
Wins & Parity

**5S**  
Machine

Delivering Margin

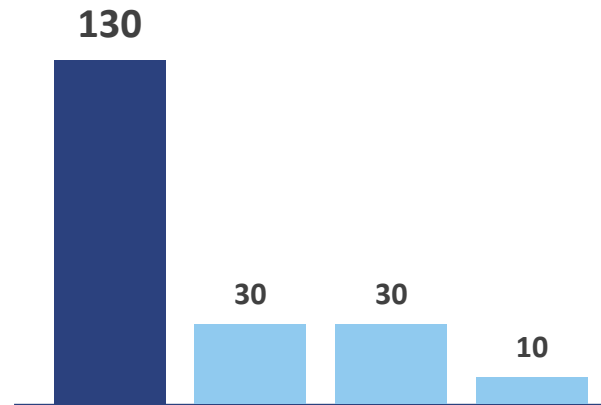
# Competitive Growth & Value Creation

## 2017 USG%



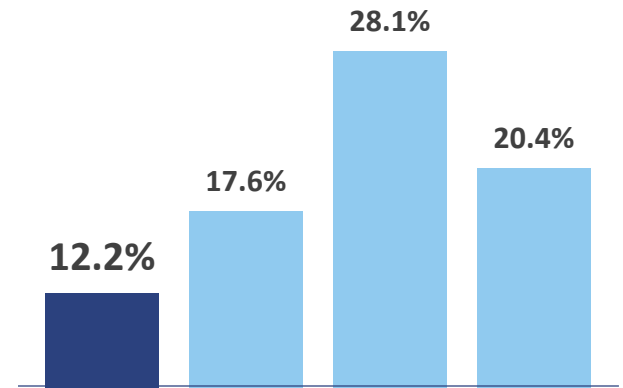
Top 3 competitors

## 2017 $\Delta$ Underlying Operating Margin



Top 3 competitors

## 2017 Underlying Operating Margin



Top 3 competitors

# Disruptive Change

## Growing Fragmentation



## Emerging Consumer “no-no’s”



## Evolving Shopper Habits



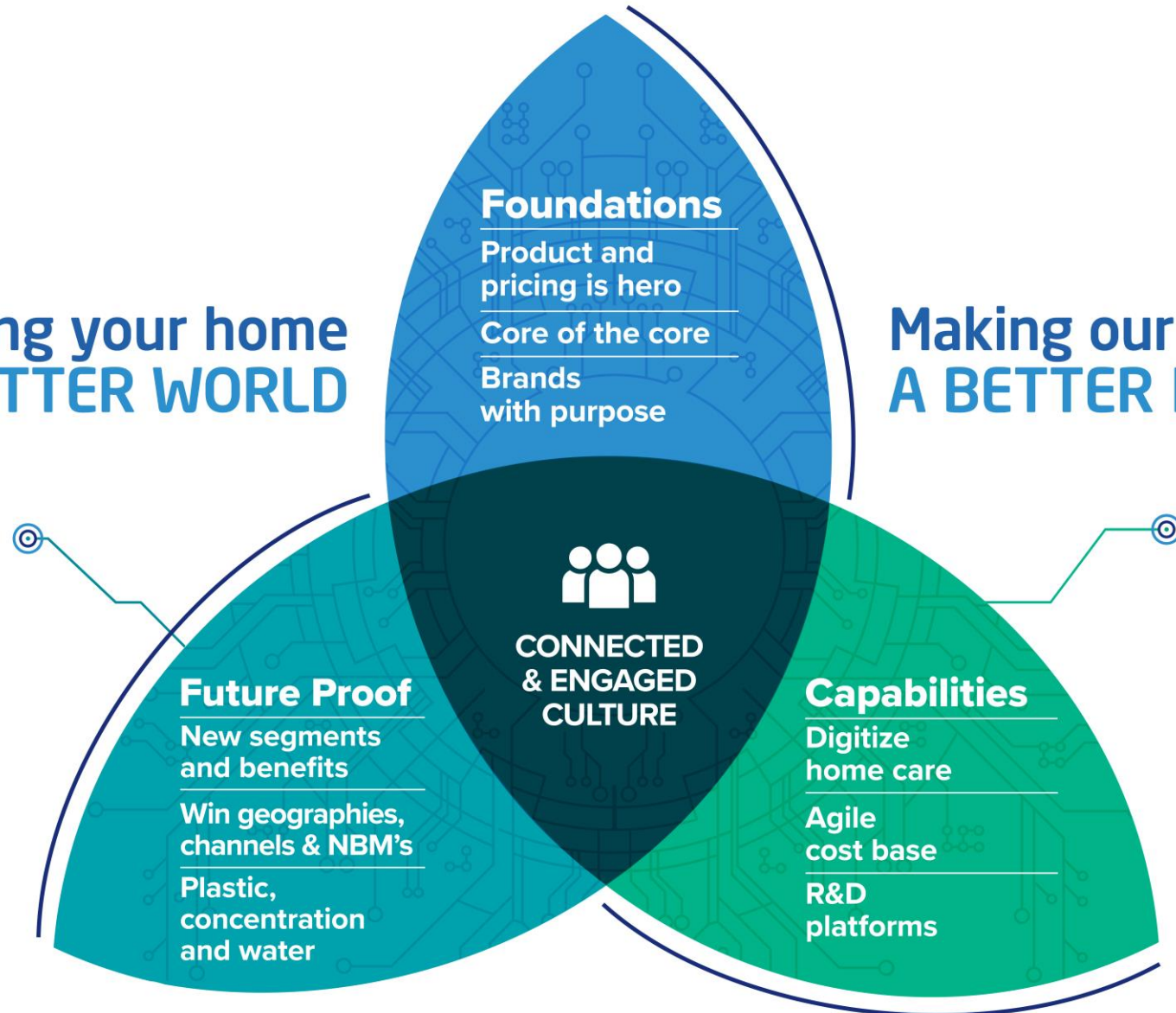
# Home Care Strategy

**Making your home  
A BETTER WORLD**

## **Foundations**

Product and pricing is hero  
Core of the core  
Brands with purpose

**Making our world  
A BETTER HOME**



# 4 Categories with Sharp & Differentiated Strategic Roles

## FABRIC SOLUTIONS

Ready to wear clothes



## FABRIC SENSATIONS

Fabric & Fashion



## HOME & HYGIENE

Caring for a cleaner world



## LIFE ESSENTIALS

Restoring life's essentials



# Sharpening Our Foundations

**Making your home  
A BETTER WORLD**

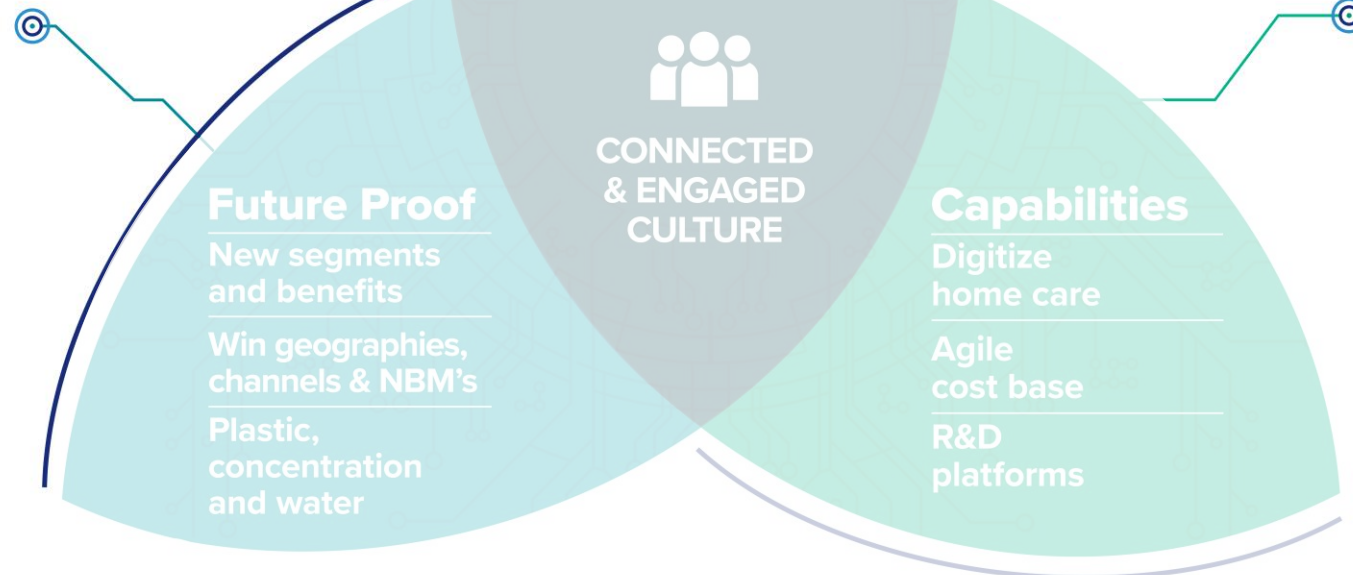
## Foundations

Product and pricing is hero

Core of the core

Brands with purpose

**Making our world  
A BETTER HOME**



# Sharpening Our Foundations

## Product is Hero



Superiority in Liquids

## Pricing is Hero

**NRM**  
NET REVENUE  
MANAGEMENT



Role



**OMO**



**Robijn**



The Art of Pricing

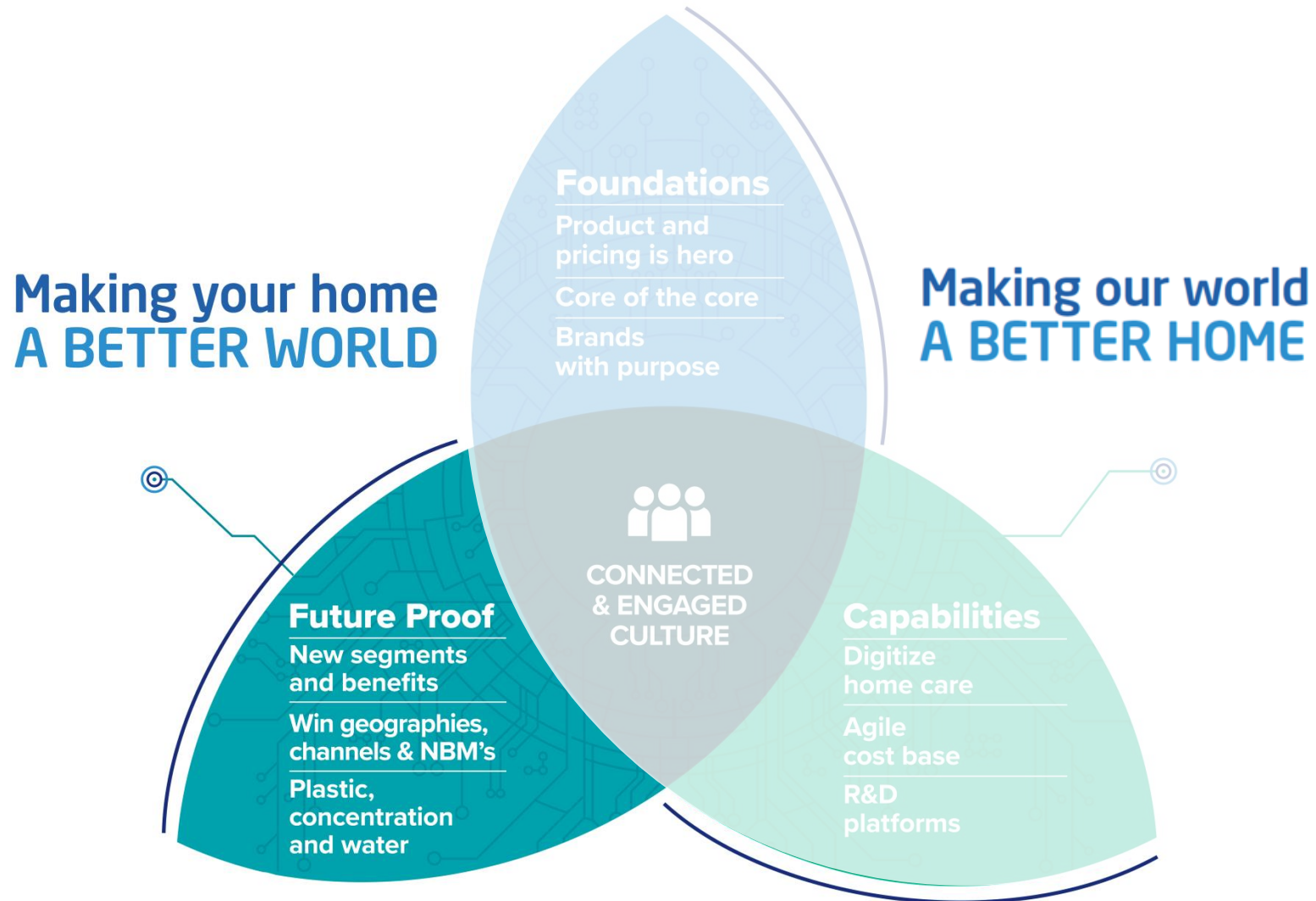
## Brands with Purpose



Purpose at the Heart



# Future Proofing Our Home Care Business



# Future Proofing Home Care Business

## Driving New Benefits



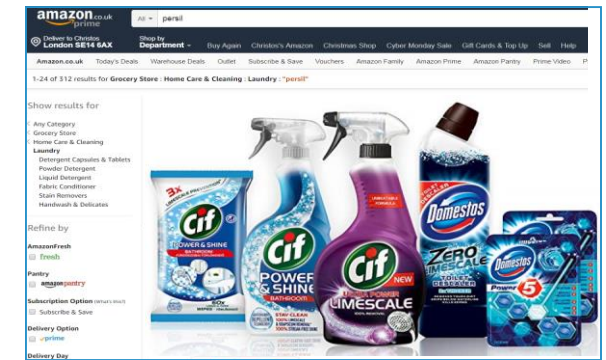
For a Future Fit Portfolio

## Pioneering New Segments



With A Start-up Approach

## Leveraging New Channels



Future Proofing Our Channel Footprint

# Future Proofing from consumer “no-no’s”

## Concentration



50% Chemical Reduction by 2025

## Plastic



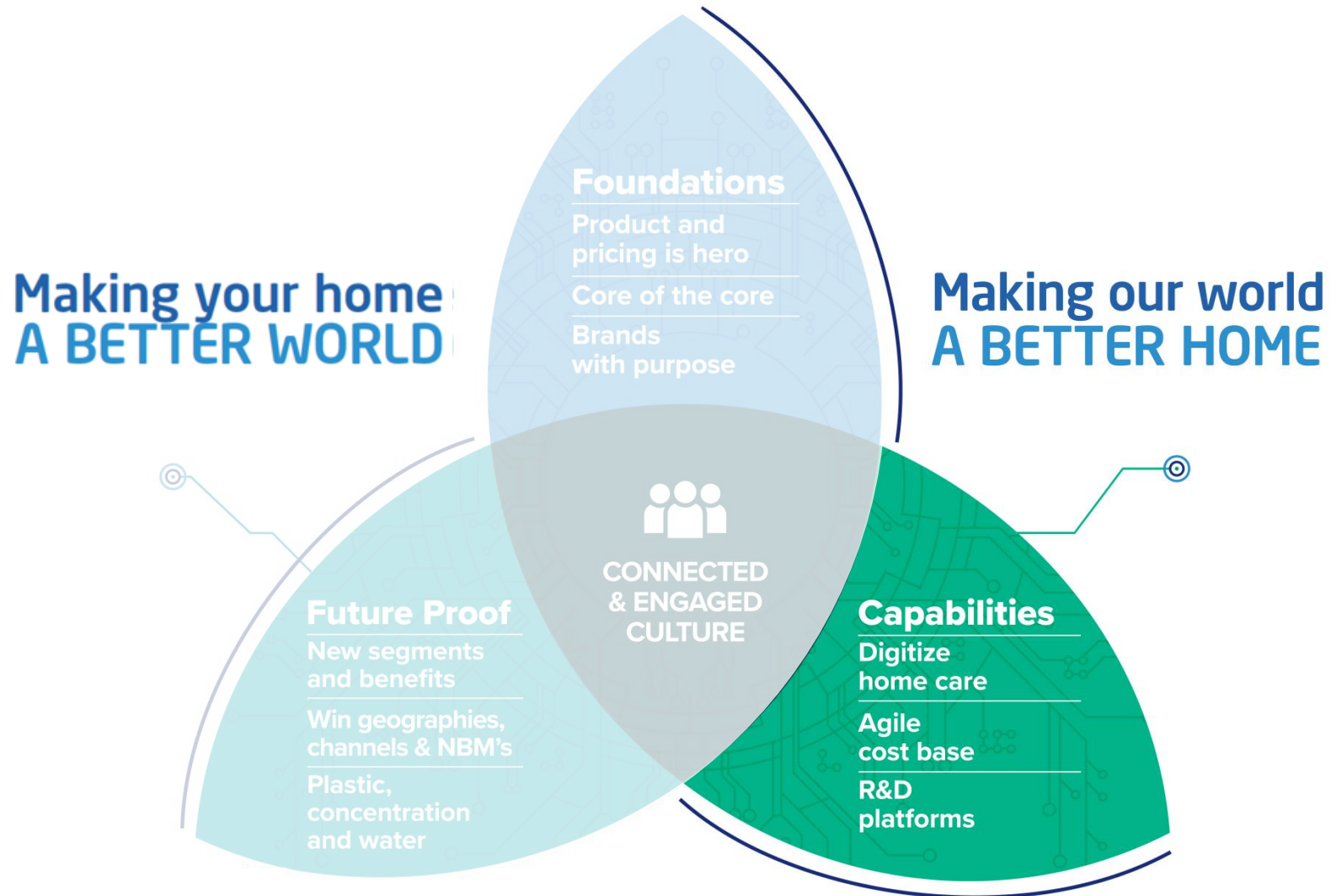
At least 25% PCR by 2025

## Plant Based Cleaning



Natural Solutions

# Focusing on Our Capabilities



# Focusing on Our Capabilities

## Data & Precision Marketing

*Cleanipedia*

from Search to Service



launched in 25 countries

## Ecosystems

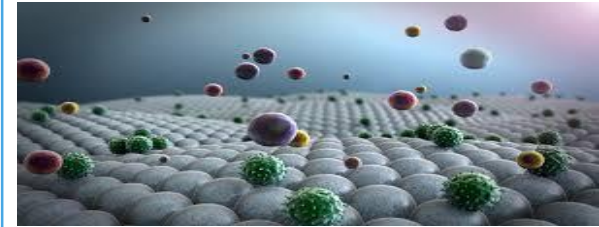


## Agile Cost Base

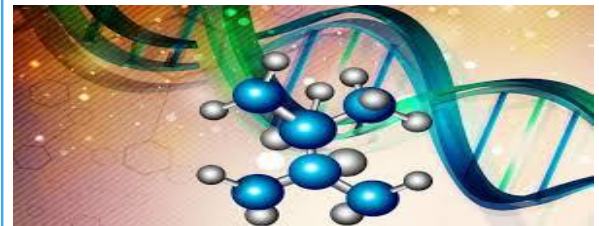


## Science & Technology

Advanced Materials & Surface Science



Biotechnology



Natural, Renewable, Regenerative

# Fluid Home Care Organisation



**Kees Kruythoff**  
President Home Care Division

## 8 Clusters



**Priya Nair**  
CCVP South Asia



**Conny Braams**  
CCVP Europe



**Frank Qu**  
CCVP North Asia



**Rajesh Sethuraman**  
CCVP Africa



**Deepak Subramanian**  
CCVP SEAA



**Eduardo Campanella**  
CCVP LATAM



**Kamuran Ucar**  
CCVP NAMET-RUB



**Joey Bergstein**  
CCVP North America

## 4 Differentiated Categories



**Enzo Devoto**  
EVP Fabric Solutions



**Madhu Rao**  
EVP Home & Hygiene



**Gina Lorenzana**  
VP Fabric Sensations



**Henk in 't Hof**  
VP Life Essentials

## Functions



**Priya Nair**  
**CCBT India**

# Home Care India

## Fabric Solutions



## Fabric Sensations



## Home & Hygiene



## Life Essentials



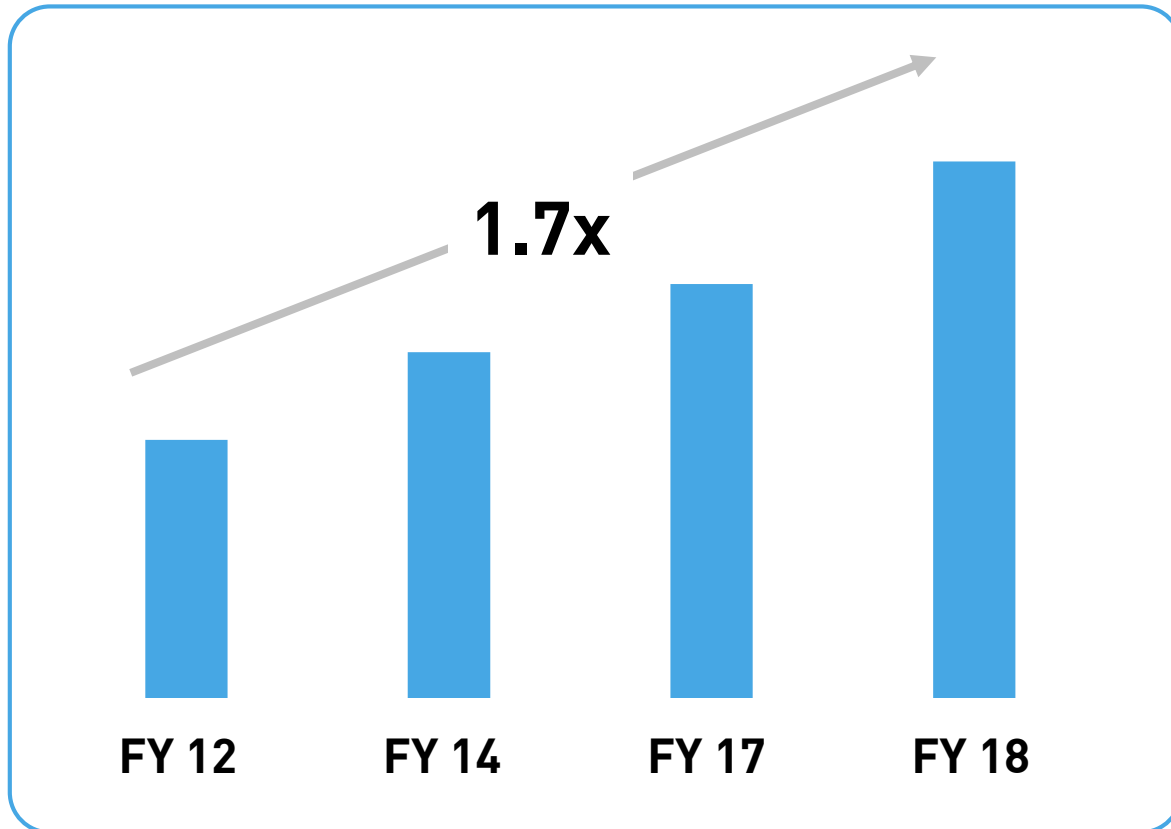
Market Size in India: €4.5bn\*

\*Nielsen Reported

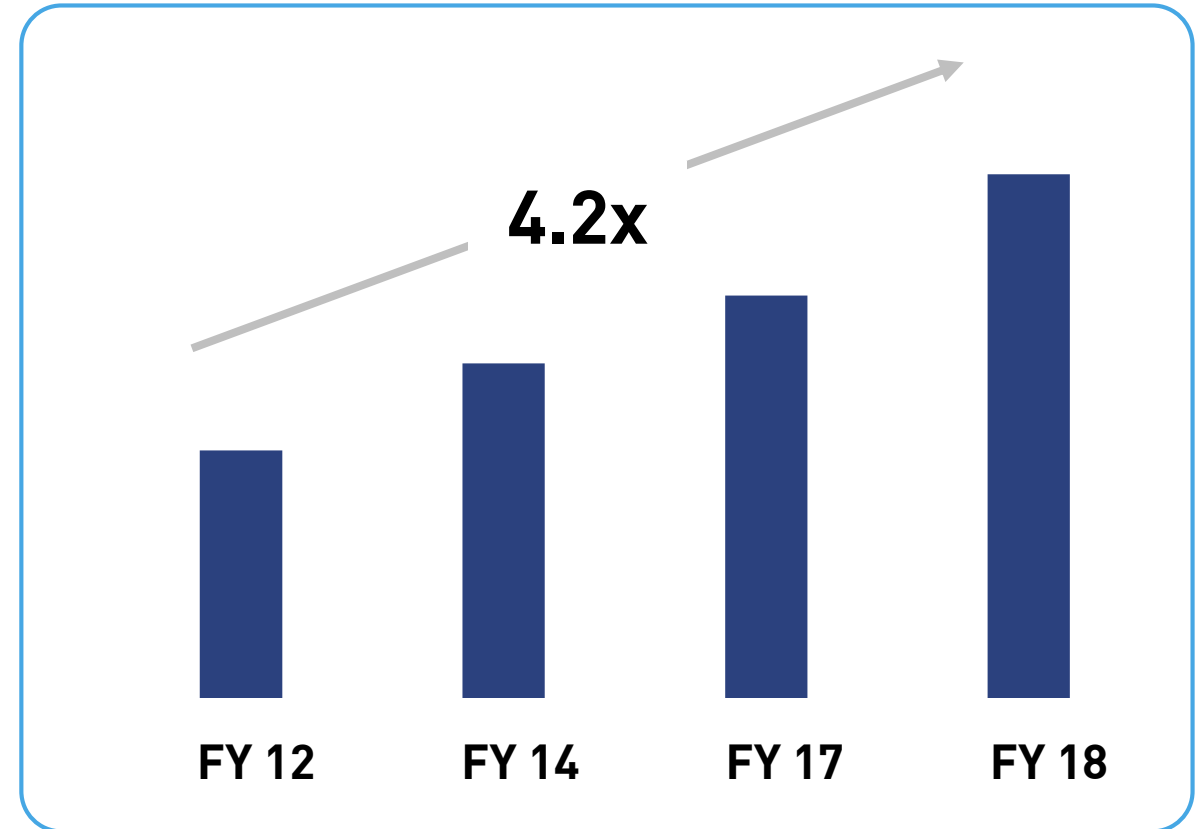


# Home Care India: A Powerhouse

## Turnover



## Profitability



**Strong , Consistent, Profitable Growth**

# Pillars of Growth

## Premiumization

% Value contr.  
of segment\*

UL Share

Tier 1  
22 %

3.5X

Tier 2  
20 %

2X

Tier 3  
58 %

X



## Market Development



MD Cells growing at 3X

Educate

Build Relevance

Sampling at Scale

## Enter White Spaces

Toilet Powders






Differentiated Proposition







# Key Enablers of Growth



## Building Brands with Purpose





## Winning in many Indias

### % Contribution of Laundry Segments\*

#### Uttar Pradesh



PREMIUM	12
POPULAR	8
MASS	79

#### Tamil Nadu



PREMIUM	40
POPULAR	42
MASS	19



\* Total market – Nielsen Reported

# Key Enablers of Growth

## Unilever Cloud

Relevant Messaging for Relevant Target Group



Anti Malodor benefit for recipe seekers

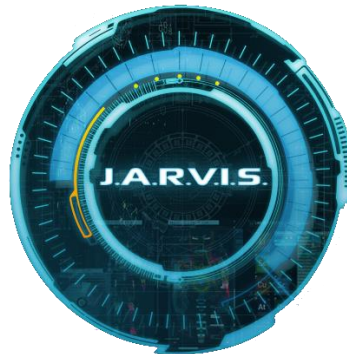


No scratches benefit for owners of expensive crockery



## Leveraging Big Data

### JARVIS



### LIVEWIRE



## Cleanipedia

### CLEANIPEDIA

Enrich cohorts for re-marketing

*Cleanipedia*

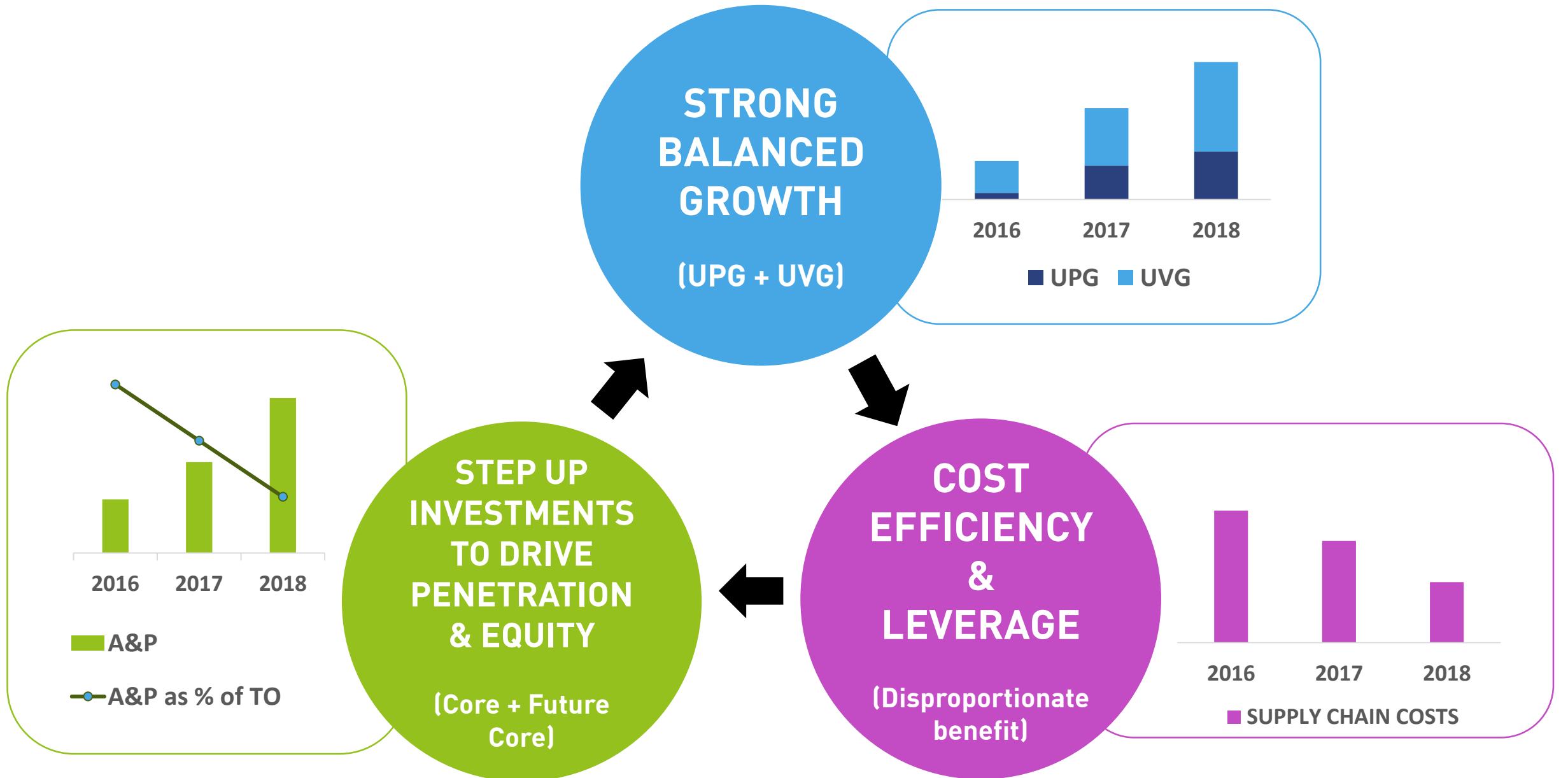
How to Clean a Microwave Oven



How to remove cloth stains during Diwali

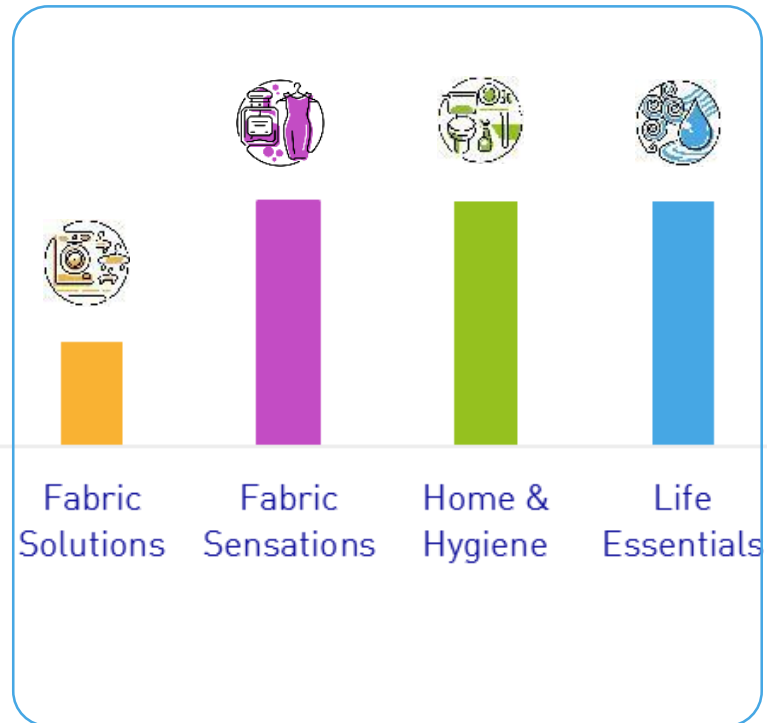


# Continuing the Growth Flywheel – India Example



# Delivering 16% Underlying Operating Margin

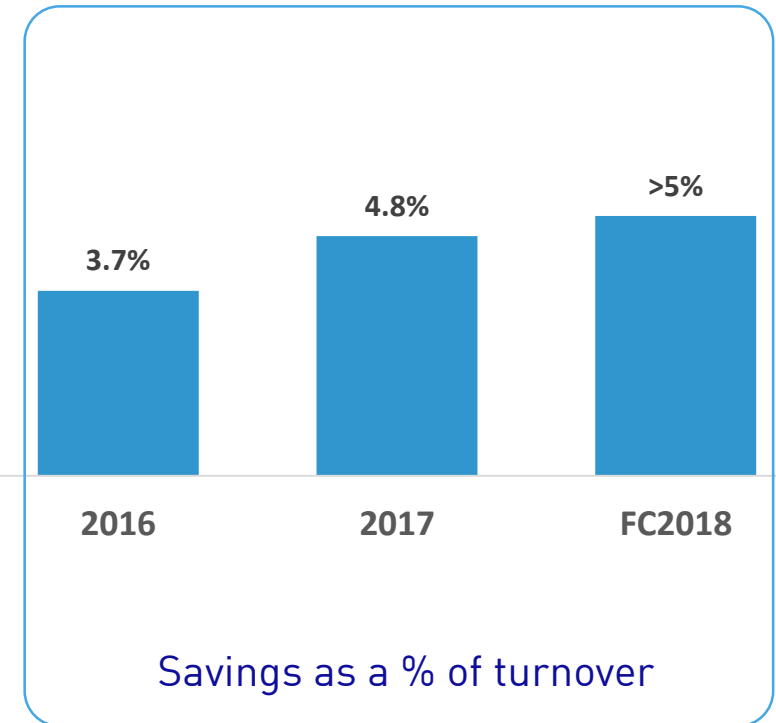
## Strategic growth mix



## Resetting our Cost Base



## 5S machine



# Summary

- **Strong foundation for sustainable growth**
- **Clear strategic role:**
  - Underlying operating margin to industry benchmarks
  - Innovation & emerging market led growth
- **Purpose-led, future-fit**
- **Accelerate our move towards an end to end Digital Business**



Making  
your home  
a better world



Making  
our world  
a better home.

# HomeCare

